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ABSTRACT

Research was conducted to establish a validated list of competencies for use in curriculum development efforts for apparel and accessories marketing programs. DACUM (Developing a Curriculum) was the occupational analysis procedure used to identify the competencies, job tasks, level of difficulty, and levels of employment for apparel and accessories (fashion merchandising) marketing programs. During the 1991-92 school year, a five-step research process involved a literature review, analysis and synthesis, a validation panel, follow-up activities, and a compilation of DACUM results and final report submission. The following activities were carried out: (1) development of a validated list of competency statements for apparel and accessories marketing programs; (2) definition of major instructional areas by sequence and level of difficulty; (3) identification of a career hierarchy and cluster chart for apparel and accessories marketing; and (4) assignment of competencies to one of five pre-baccalaureate levels of employment (entry, career-sustaining, marketing specialist, marketing supervisor, and manager-entrepreneur) within fashion merchandising retailing. (The following products are attached to the nine-page narrative: fashion merchandising career chart and 30-page fashion merchandising retailing job task listing for each of the five levels. Appendixes have the following contents: a listing of DACUM panel members; correspondence; the validation panel agenda, handouts, and minutes; a time chart and activity summary; and a 17-item bibliography.) (YLB)

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A Study to Determine the Job Tasks and Levels of Employment for Apparel and Accessories Marketing Occupations Using DACUM Occupational Analysis

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Final Report
April 24, 1992

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A Study to Determine the Job Tasks And Levels of Employment for Apparel and Accessories Marketing Occupations Using DACUM Occupational Analysis

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Abstract

During the 1991-92 school year, a study was conducted to determine a validated list of competencies (concepts and tasks) for use in curriculum development efforts for apparel and accessories (fashion merchandising) marketing programs by the researcher at Western Michigan University, the Michigan Department of Education and the Marketing Education Resource Center (MarkED). MarkED is a non-profit research and development agency affiliated with the Ohio State University and operated by 37 state education departments in a consortium arrangement.

DACUM or "Developing A Curriculum" was the occupational analysis procedure use to identify the competencies, job tasks, level of difficulty and levels of employment for apparel and accessories marketing programs. DACUM analysis provides a systematic approach to determining the competencies that must be performed by persons in a given job or occupational area through the use of business/industry panels. Using a 5-step research process including a literature review, analysis and synthesis, a validation panel, follow up activities and a compilation of DACUM results and final report submission, the study:

1) developed a validated list of competency statements for apparel and accessories marketing programs,

2) defined major instructional areas by sequence and level of difficulty,

3) identified a career hierarchy and cluster chart for apparel and accessories marketing, and

4) assigned competencies to one of five pre-baccalaureate levels of employment (entry, career-sustaining, marketing specialist, marketing supervisor, and manager-entrepreneur) within fashion merchandising retailing.

Acknowledgements

A Study to Determine the Job Tasks and Levels of Employment for Apparel and Accessories Marketing Occupations Using DACUM Occupational Analysis was developed under the MarkED guidelines for a Lee Honors College thesis required for graduation. Dr. Carl Woloszyk, associate professor at Western Michigan University, served as the project mentor.

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Statement of the Problem

The mission of marketing education at pre-baccalaureate levels is to develop competent workers in and for the major occupational areas within marketing, assist in the improvement of marketing techniques, and build understandings of the wide range of social and economic responsibilities that accompany the right to engage in marketing in a free enterprise system.

Marketing education programs throughout the nation are being structured to match the wide diversity within the field of marketing. Marketing programs must deal with the principles, concepts, attitudes , and skills necessary to prepare students to work in retail, wholesale, service, and manufacturing environments, from the first job of the new employee to technical and managerial positions. Competencies ranging from point-of-sale operations to planning, budgeting, and supervising are all part of a marketing education curriculum. Competencies are defined as the required job tasks, concepts and attitudes to successfully perform a job in marketing.

The problem under study was the identification through occupational analysis of relevant, up-to-date, competencies for curriculum development in apparel and accessories marketing programs.

Apparel and Accessories Marketing is defined as a group of instructional programs that prepare individuals to perform marketing functions and tasks in retail establishments, wholesale establishments, and manufacturing firms primarily engaged in the marketing of clothing and related articles for personal wear and adornment.

DACUM or "Developing A Curriculum" was the occupational analysis procedure used to identify competencies, job tasks, and levels of employment for apparel and accessories marketing occupations. DACUM analysis has been proven to be a very effective method of quickly determining, at relatively low cost, the competencies that must be performed by persons employed in a given job or occupational area.

DACUM has been successfully used to analyze occupations at the professional, technical, skilled, and semi-skilled levels. DACUM operates on the following three premises:

1. expert workers are better able to describe/define their job than anyone else,

2. any job can be successfully and sufficiently described in terms of the tasks that successful workers in that occupation perform and;

3. all tasks have direct implications for the knowledge and attitudes that workers must have in order to perform the tasks correctly.

Through the use of business/industry panels consisting of expert workers and supervisors, the DACUM process results in the identification of duties and job task statements. These duty and job task statements outline what a successful worker in a particular job or cluster of related jobs must be able to do.

Panel members are recruited directly from business, industry, or the professions. The panel members work under the guidance of a facilitator(s) to verify the task lists, assign tasks to levels of employment, and establish a hierarchy of jobs within the occupational area. Modified small-group brainstorming techniques are used to obtain the collective expertise and consensus of the panel. Dr. Carl Woloszyk, Associate Professor in the Department of Consumer Resources and Technology, served as my mentor during this research for my thesis.

Background for the Study

Marketing education is a vocationally oriented program designed to meet the needs of persons who have entered or are preparing to enter an occupation or entrepreneurial venture requiring competencies in marketing. Marketing occupations are chosen by persons engaged primarily in the marketing of goods, services, or ideas at all employment levels.

Employment in marketing can be conceptualized in levels from simple to complex in terms of assigned responsibilities and extent of skills and knowledge required. the occupational requirements for each level of employment guide the identification of instructional objectives and learning activities. The marketing activities which take place at each level of employment are classified in the broad categories of marketing

functions, but the activities vary in complexity from level to level. Pre-baccalaureate marketing education is directed to instruction at the first levels of marketing employment.

Entry level marketing occupations involve standard or routine activities with limited need for decision-making skills. These jobs may be obtained by individuals with no previous marketing education, experience or commitment to a marketing career. Competencies required to secure and hold such a job address good personal appearance, general business behavior and basic skills such as math and communications. Representative job titles in apparel and accessories marketing at this level include bagger, clerk, merchandise clerk, cashier or stock lead.

Career-sustaining level marketing occupations involve performing more complex duties, using routine decision-making skills and limited control of one's own working environment. Individuals in a career-sustaining level job should have a basic understanding of the marketing concept and its foundations and have indicated an initial interest in marketing as a potential career. Representative job titles in apparel and accessories marketing at this level of employment include cashier, team leader, customer service representative, sales representative, salesperson, stockperson or sales support.

Marketing Specialist occupations involve frequent use of decision-making and leadership skills. Jobs at this level require mastery of marketing skills across functions or extensive technical knowledge/skill in one function. Individuals in a marketing specialist occupation need to have a thorough understanding of the marketing concept and its functions. Representative job titles in apparel and accessories marketing at this level include assistant buyer, management trainee, professional sales associate, customer service lead, commissioned sales consultant, visual lead or visual merchandiser.

Marketing supervisor occupations involve a high level of competence in decision-making and leadership. Individuals in this role are responsible for planning, coordinating, and supervising marketing related activities. Representative job titles in

apparel and accessories marketing at this level include assistant manager, department manager, department supervisor, merchandise manager, operations manager, customer service manager or buyer.

Manager-entrepreneur implies competence in a variety of tasks related to owning one's own business or managing a department within an organization. Individuals at this level are fully responsible for the success or failure of a unit within an organization or a small business enterprise. A comprehensive understanding of marketing and management competencies is required to function in this role. Representative job titles in apparel and accessories marketing at this level include merchandise manager, owner, store manager, district manager or regional manager.

There are higher levels of employment in marketing, which involve the preparation of individuals for top-level positions, such as executives of large companies. These positions usually require baccalaureate degrees or extensive experience and a thorough comprehension of the theories of marketing and their application to corporate activity, but are not the focus of my study.

Purposes for the Study

The purposes of this study were to develop the following:

1. a job task listing for apparel and accessories marketing occupations
2. a job task listing by sequence and level of difficulty
3. a job task listing by levels of employment within apparel and accessories marketing occupations
4. a marketing education job hierarchy and career cluster chart for apparel and accessories marketing occupations

Methodology

As indicated in the Statement of the Problem section of this final report, a DACUM

analysis was used to validate the tasks, sequence tasks by difficulty of instruction, assign tasks to the appropriate level of employment and develop a hierarchy of jobs within apparel and accessories marketing occupations.

The research process involved with this study consisted of 5 distinct steps:

Step 1: Literature review of tasks performed in the industry from job task listings, commercial texts and industry panels

Step 2: Analysis and synthesis by major instructional areas (ie. selling, promotion, etc.)

Step 3: Conduct a validation meeting

Step 4: Follow-up activities and final compilation of DACUM results

Step 5: Submission of final report to MarkED, Michigan Department of Education and WMU's Honors College

The above research procedure is used by the Marketing Education Resource Center, Inc. (MarkED). MarkED is a non-profit research and development agency affiliated with the Ohio State University and operated by 37 state education departments in a consortium arrangement.

Established in the early 1970's, MarkED's mission is to develop and disseminate systematic approaches for planning, directing, and evaluating curricula for marketing-related occupations. The mission is addressed through four broad goals:

1. to provide professional development for marketing instructors (high school and community/technical colleges)

2. to develop valid curriculum and instructional materials for high school, post-secondary and adult educators using sound, research-based models

3. to provide and information-management service supporting instructors' efforts to remain current in marketing and in education for marketing

4. to maintain an ongoing research program to support valid, quality instruction in marketing

MarkED uses a qualitative approach to occupational research, based on well-documented DACUM procedures. MarkED's process incorporates a three-stage progression of panels for duty identification, competency identification and validation.

The researcher performed Steps 1-5 in the above research process. The initial literature review (Step 1) was completed by the researcher to 1) provide an industry overview, 2) identify technical terms/definitions and 3) identify research/task listings.

After analysis and review (Step 2) of the literature, a list of competencies was compiled by the researcher for further validation.

The researcher and project mentor conducted a one-day validation panel review (Step 3) on March 10, 1992, with 5 expert workers and supervisors. The purpose of the validation panel review was to 1) validate the task list, 2) verify tasks in terms of level of task, 3) sequence each task and concept by level of difficulty, and 4) identify a career hierarchy and representative job titles within the occupational area of apparel and accessories marketing.

Validation panel members had to meet the following criteria for selection to the panel: 1) be an owner or supervisor in an apparel and accessories retail setting, 2) be a competent and active professional, and 3) be willing to devote time to the validation panel meeting and subsequent follow-up and review activities.

The researcher made the final selection of the members and confirmed by telephone their willingness to participate in the study. A complete listing of the panel members names, firms, position and retail sector within the apparel and accessories industry which they represented are found in Appendix A.

After the validation panel members were identified and confirmation was received regarding their willingness to participate in the study, and invitational letter was sent to them. A one-day validation panel meeting was held on March 10, 1992 at the Fetzer

Center on the campus of Western Michigan University in Kalamazoo, Michigan. Along with the letter, the following enclosures were sent to the members in advance of the meeting:

1. WMU campus map
2. Overview of Marketing Education Validation Panel Process
3. Marketing Education Resource Center, Inc. Description
4. Marketing Education in Michigan

The invitational letter and accompanying enclosures are found in Appendix B. An agenda was developed for the meeting and handout materials were distributed to the members. Handouts included the following:

1. Marketing Education Mission Statement
2. Levels of Employment in Marketing
3. General Marketing Career Cluster Chart
4. MarkED Catalog
5. Initial Fashion Merchandising List of Competencies

Validation panel members were asked to identify representative job titles for each level of employment, review each task for wording and level of difficulty, and identify each task at the appropriate level of employment in marketing. Minutes, comments and the general proceedings were recorded during the validation process.

The agenda for the meeting, handouts, and the minutes from the validation panel meeting are shown in Appendix C.

After the meeting, the researcher reviewed the task statements, clarified several tasks and included additional tasks, which were suggested by the panel (Step 4). A follow-up letter was sent to each validation panel member asking for corrections and/or changes. A letter of participation was returned by each panel member on March 26, 1992, indicating their agreement related to the concepts and job tasks, which were developed by the entire panel. The follow-up letter and individual participation records are shown in Appendix D.

After subsequent follow-up review by the validation members, a final list of representative job titles and job tasks, sequenced by level of difficulty and by level of employment was prepared.

Results

The information obtained by using the DACUM process provided the researcher with the means to systematically analyze job tasks and concepts required by workers in apparel and accessories marketing occupations. In addition, the identified competencies will form the framework for the development of competency-based instructional modules that are used by approximately 750,000 high school marketing students throughout the United States each year.

As another result of the study, the Michigan Department of Education will receive a MarkED consortium membership credit. The results will also be used to update the Michigan Marketing Education Curriculum Guide, which is used by over 200 high school marketing educators. Letters indicating the importance of the study are found in Appendix E.

The identification of validated competencies for apparel and accessories marketing will provide for future curriculum and product development by the Marketing Education Resource Center (MarkED) on a nationwide basis.

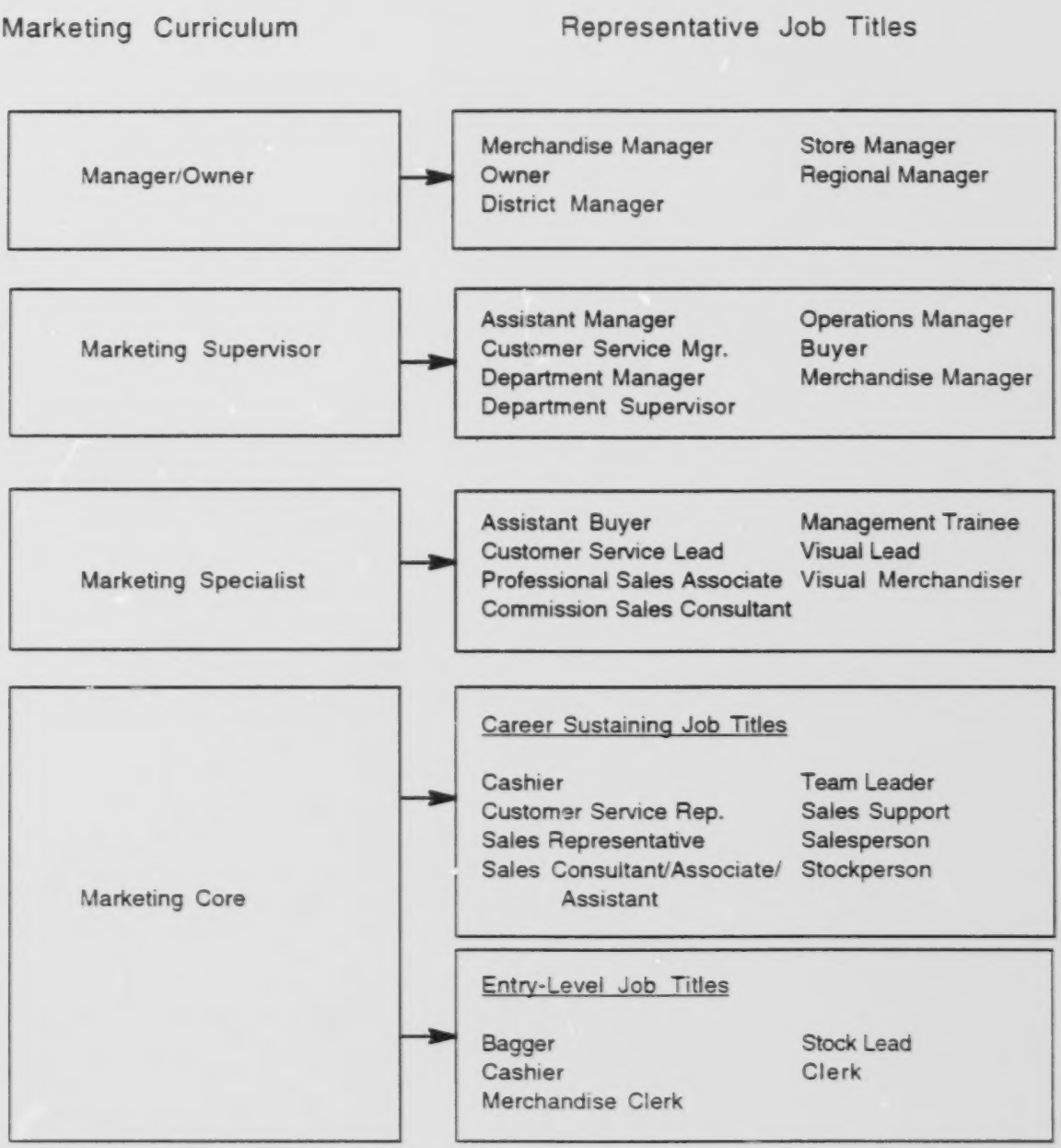
The finalized Fashion Merchandising Career Chart (including representative job titles), and Fashion Merchandising Job Task Listing (sequenced by level of difficulty and by level of employment) are found on the following pages.

Concluding Remarks

Through conducting this research and compiling the findings, the researcher has learned many aspects of the fashion industry and feels that this knowledge will be very beneficial in future endeavors. There is a lot of information in this report about what is really done in fashion retailing and who is responsible to do it. It will be

especially useful in areas of human resource management, specifically in supervising others and training them while knowing what to expect from them. A listing of specific activities performed in completing this study is shown on Appendix F.

FASHION MERCHANDISING CAREER CHART



Fashion Merchandising Retailing
Job Task Listing

MICHIGAN VALIDATION PANEL FOR FASHION MERCHANDISING
ECONOMICS

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
Explain the concept of profit	Explain the concept of economic goods and services	Explain the concept of economic activities		
Explain the concept of competition	Explain the concept of economic resources	Explain the concept of utility		
Explain the concept of productivity	Explain the concept of supply and demand	Explain the types of economic systems		
	Explain the concept of private enterprise	Explain the relationship of government and business		
	Explain the concept of price	Explain the concept of gross national product		
	Explain the concept of risk	Explain the concept of business cycles		
	Explain the concept of specialization/division of labor	Explain the nature of international trade		
	Explain the concept of organized labor			

MICHIGAN VALIDATION PANEL FOR FASHION MERCHANDISING
MATHEMATICS

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
Solve addition problems				
Solve subtraction problems				
Solve multiplication problems				
Solve division problems				
Solve mathematical problems involving fractions				
Solve mathematical problems involving percentages				
Calculate tax, discounts, and miscellaneous charges for purchases				
Make change				
Inspect for counterfeit currency				
Operate register/P.O.S. terminal				
Prepare/Maintain cash drawers				
Correct register/terminal errors				
Close out register/terminal				
Verify/Record cash				
Complete sales checks				
Complete charge sale transactions				
Accept customer/client checks				
Verify identification				
Process layaway sales				
Complete bank deposits/records				
Convert American standard measurements to metric measurements (shoes/imported clothing)				
Prepare/Process UPS shipping forms				
	Read charts and graphs			
		Solve first-degree algebraic equations		

MICHIGAN VALIDATION PANEL FOR FASHION MERCHANDISING
MATHEMATICS CONTINUED

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
		Calculate net sales Interpret profit and loss statements		
				Record and report sales tax

MICHIGAN VALIDATION PANEL FOR FASHION MERCHANDISING
COMMUNICATIONS

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
Use proper grammar and vocabulary				
Address people properly				
Use telephone in businesslike manner				
Prepare simple written reports				
Listen to and follow directions				
Read inter-departmental/company communications				
Read employee publications				
	Explain the nature of effective communications			
	Explain the nature of effective verbal communications			
	Explain the nature of written communications			
	Explain the nature of staff communications			
	Give directions for completing job tasks			
	Develop listening skills			
	Make oral presentation about product knowledge			
	Write fashion show commentary			
	Deliver fashion show commentary			
		Write business letters		
		Prepare complex written reports		
		Conduct staff meeting		

MICHIGAN VALIDATION PANEL FOR FASHION MERCHANDISING
HUMAN RELATIONS

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
Maintain appropriate personal appearance				
Maintain positive attitude				
Demonstrate interest and enthusiasm				
Demonstrate responsible behavior				
Demonstrate honesty and integrity				
Demonstrate ethical behavior				
Demonstrate orderly and systematic behavior				
Demonstrate initiative				
Demonstrate self-control				
Demonstrate appropriate creativity				
Explain personal strengths and weaknesses				
Adjust to change				
Set personal goals				
Use time-management principles				
Explain the nature of positive customer/client relations				
Handle customer inquiries				
Direct customer/client to other locations				
Explain management's role in customer relations				
Show empathy for others				
Explain procedures/options for handling difficult customers				
Demonstrate sensitivity to ethnic/cultural/disabled differences				
	Develop personality traits important to business			
	Explain the concept of self-esteem			
	Use feedback for personal growth			

MICHIGAN VALIDATION PANEL FOR FASHION MERCHANDISING
HUMAN RELATIONS CONTINUED

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
Use appropriate assertiveness Interpret business policies to customers/clients Handle customer/client complaints Foster positive working relations				
	Reinforce others' positive behavior Demonstrate an understanding of a diversified workforce Recognize the abilities of others			

MICHIGAN VALIDATION PANEL FOR FASHION MERCHANDISING
HUMAN RESOURCE MANAGEMENT

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
Explain the nature of remedial action				
	Plan and organize work			
	Assist in training others			
		Schedule employees		
		Calculate personnel turnover rate		
		Explain ways to develop a positive working environment		
		Explain ways to build employee morale		
		Explain the concept of staff motivation		
		Explain relationship of communications with employee motivation		
		Explain the concept of employee participation in decision making		
		Explain the role of leadership in business		
		Explain techniques for recruiting new employees		
		Interview job applicants		
		Orient new employees		
		Explain the role of training and human resource development		
		Conduct training class/program		
		Explain the nature of wage and benefit programs		
		Develop employee incentive program		
			Maintain personnel records	
			Develop personnel organizational plan	
			Develop job classifications	
			Determine hiring needs	
			Handle employee complaints and grievances	

MICHIGAN VALIDATION PANEL FOR FASHION MERCHANDISING
HUMAN RESOURCE MANAGEMENT CONTINUED

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
			Use evaluation data for staffing decisions	
			Explain techniques for recruiting mgt. personnel	
			Select new employees	
			Orient new employees (management's role)	
			Explain the nature of mgt./supervisory training	
			Evaluate employees	
			Approve remedial action	
			Approve employee incentive program	
			Process employee transfer records	
			Plan goals and objectives for specific jobs	
			Supervise work of employees	
			Conduct exit interview	
				Establish personnel policies
				Write job descriptions

MICHIGAN VALIDATION PANEL FOR FASHION MERCHANDISING MANAGEMENT

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
Explain employee role in expense control				
	Explain the nature of overhead/operating costs Develop expense-control plans Explain the nature of operation budgets Develop sales-support budget Use budgets to control operations Explain external planning considerations Explain legal considerations for company operation Explain types of records needed for business operations			
		Analyze operating results in relation to budget/industry Develop company objectives (for management unit) Establish operating policies Determine cost-effective operating hours		
			Develop company-wide budget	

MICHIGAN VALIDATION PANEL FOR FASHION MERCHANDISING OPERATIONS

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
Explain the nature and scope of operations Handle company equipment properly Operate business machines (i.e. calculator, keyboard, etc.) Explain functions of store maintenance Complete housekeeping responsibilities Manage supplies	Explain the use of general office equipment Explain the use of computers Open and close store		Plan maintenance program	Analyze the business's environment Select business location Select business premises

MICHIGAN VALIDATION PANEL FOR FASHION MERCHANDISING
PRODUCT KNOWLEDGE

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR

Use common apparel and accessories terminology
Use characteristics of fibers, yarns and fabrics to identify benefits
Identify special finishes on fabrics to identify benefits
Evaluate style characteristics of men's, women's and children's apparel
Evaluate silhouette/model characteristics of men's, women's and children's apparel
Use characteristics of all outerwear to identify benefits
Use characteristics of men's, women's and children's foundations/swimwear to identify benefits
Use characteristics of shoes, footwear and accessories to identify benefits
Advise customers on current fashions
Determine size and fit (men's, women's and children's apparel)
Explain common garment construction methods and features to identify benefits
Maintain quality control standards for apparel and accessories

MICHIGAN VALIDATION PANEL FOR FASHION MERCHANDISING
DISTRIBUTION

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
Explain the nature and scope of distribution				
Explain the receiving process				
Explain stock-handling techniques used in receiving deliveries				
Determine check-in processing priorities				
Check incoming stock				
Price mark stock (stamps, tags, tickets, etc.)				
Record price changes				
Store merchandise in an appropriate manner				
Transport stock to selling floor				
Monitor inventory levels				
Complete inventory counts				
Inspect and prepare merchandise for floor (unwrap, steam, change hangers)				
	Explain storing considerations			
	Organize stock counts			
	Process damaged product			
	Define common shipping terms			
	Check for shipping/receiving discrepancies			
	Prepare merchandise for transfer (to/from) branches			
	Organize merchandise storage space			
		Select appropriate storage equipment		
		Explain the nature of inventory control systems		
		Explain types of unit inventory control systems		
		Calculate inventory shrinkage		
		Maintain unit inventory control systems		

MICHIGAN VALIDATION PANEL FOR FASHION MERCHANDISING
DISTRIBUTION CONTINUED

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
		Explain the nature of dollar inventory control systems		
		Maintain dollar inventory control systems		
		Explain the nature of channel strategies		
		Reconcile shipping/receiving discrepancies		
		Process returns to vendor		
		Determine and maintain best location for merchandise		
		Transfer merchandise (to/from branches, etc.)		
			Select appropriate channels	
			Establish receiving/delivery schedules	
			Plan merchandise storage space	
			Establish stock handling procedures	
			Select physical carriers	
				Establish inventory control system
				Coordinate distribution with other marketing activities
				Choose appropriate product packaging

MICHIGAN VALIDATION PANEL FOR FASHION MERCHANDISING
FINANCING

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
Facilitate consumer/individual credit applications Explain bank credit cards (such as Mastercard/VISA) Comply with bankcard acceptance procedures	Explain the nature and scope of financing Explain the purposes and importance of credit Facilitate business/group credit applications Explain the purpose and importance of obtaining credit (business) Interpret/Explain credit policies Make/Order charge plate/card Extend credit to customers	Explain credit statements Process customer credit invoices/statements	Analyze customer accounts Collect past-due accounts Arrange extended repayment plan Explain the factors affecting extension of credit Explain the use of credit bureaus Use the services of credit bureaus	Close credit accounts Explain legal considerations for granting credit

MICHIGAN VALIDATION PANEL FOR FASHION MERCHANDISING
FINANCING CONTINUED

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
				Establish credit policies and procedures
				Develop credit application form
				Obtain line of credit
				Comply with credit regulations
				Establish collection procedures
				Establish collection periods

MICHIGAN VALIDATION PANEL FOR FASHION MERCHANDISING
MARKETING-INFORMATION MANAGEMENT

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
	Comparison shop competitors' merchandise			
		Explain the nature and scope of marketing-information management Explain the nature of marketing-research (what it is, process) Select sources of information (primary vs. secondary, defined, so reasons for selecting one) Select research method for gathering data (survey, experimental, personal interview, observational, etc.) Develop simple questionnaire Prepare sampling plan (sampling unit, size, procedure) Explain the nature of demand analysis Explain the nature of sales forecasts Interpret trends in sales volumes Interpret market demand Determine sales potential Forecast sales		
			Interpret factors affecting market share Identify fashion trends	
				Develop marketing plan Analyze need to conduct marketing research Identify marketing research objectives

MICHIGAN VALIDATION PANEL FOR FASHION MERCHANDISING
MARKETING-INFORMATION MANAGEMENT CONTINUED

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
				Develop marketing strategy

MICHIGAN VALIDATION PANEL FOR FASHION MERCHANDISING
PRICING

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
		Explain the nature and scope of pricing Explain factors affecting selling price Explain the psychological effects of pricing Calculate break-even points Explain the nature of company pricing policies/strategies Explain legal considerations of pricing Adjust prices		
			Establish selling price (management) Establish price Establish pricing structure	
				Establish mark-up for each line Establish pricing policies Determine pricing strategies Establish discount policies

MICHIGAN VALIDATION PANEL FOR FASHION MERCHANDISING
PRODUCT/SERVICE PLANNING

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
Explain the nature and scope of product/service planning				
Explain applicable grades and standards				
Explain warranties and guarantees				
Explain the role of special customer services				
Explain environmental factors (natural fibers/ingredients) conducive to customer/client satisfaction				
	Explain the nature of product-life cycles			
	Explain critical aspects of business image			
	Explain the role of branding			
	Explain consumer protection provisions of appropriate agencies			
	Explain the nature of the product-development process			
	Explain the nature of product positioning			
	Explain the nature of packaging			
	Explain the concept of product mix			
	Explain the concept of assortment planning			
		Plan product mix		
		Analyze a product's life cycle		
			Explain business location considerations	
			Determine space allocation and layout	
			Analyze a company's image	
			Analyze a store's/company's life cycle	

MICHIGAN VALIDATION PANEL FOR FASHION MERCHANDISING
PRODUCT/SERVICE PLANNING

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
				Identify target market(s) Develop product/service plans and schedules

MICHIGAN VALIDATION PANEL FOR FASHION MERCHANDISING
PROMOTION

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
Explain the types of media Explain the use of slogans	Explain the role of promotion Explain the types of promotion Explain the nature of company participation in community activities Explain the use of catalogs as a promotional tool Calculate media costs Letter display signs Design display signs Prepare merchandise for display Arrange display products Dress and assemble mannequins Adjust/Install lighting Assemble displays Maintain displays Dismantle displays Decorate business/department for special event Use display fixtures	Explain the concept of promotional mix Calculate media costs Select promotional media Contract for print advertising Promote through publicity Write news release		

MICHIGAN VALIDATION PANEL FOR FASHION MERCHANDISING
PROMOTION CONTINUED

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
		Plan use of specialty advertising, premiums, etc.		
		Explain the nature of a promotional program		
		Use past advertisements for promotional planning		
		Coordinate promotional activities		
		Prepare promotional budget		
		Prepare advertising budget		
		Seek cooperative advertising/promotional materials		
		Use advertising agency		
		Explain types of media used by competitors		
		Explain parts of a print advertisement		
		Prepare (print) advertising copy		
		Check advertising proofs		
		Explain the use of visual merchandising		
		Explain the use of visual merchandising to create image		
		Explain the relationship of merchandising and visual merchandising		
		Explain types of display arrangements		
		Explain display techniques that encourage identification with client		
		Develop color scheme		
		Construct display backgrounds		
		Select display fixtures		
		Explain the use of vendor support/display aids		
		Explain sign printing/production procedures		
		Design preliminary display sets		
		Design special-purpose displays		
		Explain assembly considerations		
		Maintain display working area		

MICHIGAN VALIDATION PANEL FOR FASHION MERCHANDISING
PROMOTION CONTINUED

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
		Maintain display records Arrange trunk showing (apparel) Explain key elements of a fashion show Plan/Schedule displays/theme with management		
			Evaluate media/advertising effectiveness Select products for promotion Develop a comprehensive, company-wide promotional program Prepare advertising budget Select an advertising agency Determine/approve promotional policy/strategy Explain supply and fixture purchase considerations Explain recordkeeping procedures for display storage Inspect/Approve displays Explain the use of display evaluation Plan use of specialty advertising, premiums, etc. Plan special promotions (credit, employee incentives) Explain promotional methods for apparel and accessories Use community leaders and activities to develop a fashion image Determine promotional objectives Prepare advertising calendar Monitor competitors' promotions Select promotional theme	

MICHIGAN VALIDATION PANEL FOR FASHION MERCHANDISING
PROMOTION CONTINUED

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
			Develop promotional plan for business	
				Approve news release
				Approve advertising budget
				Approve a comprehensive, company-wide promotional program
				Design seasonal/special event catalog
				Plan sales promotions
				Plan promotional schedule
				Develop advertising headlines
				Select advertising layouts
				Develop radio advertisement
				Select promotional mix

MICHIGAN VALIDATION PANEL FOR FASHION MERCHANDISING
PURCHASING

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
	Explain the nature and scope of buying/purchasing Order merchandise			
		Explain company buying/purchasing policies Evaluate the nature of buying/purchasing process Determine what to buy Determine quantities to buy Determine when to buy Choose vendors/resources Negotiate purchasing contract Analyze/Select appropriate products Calculate merchandising-related discounts Determine final cost of product to company Schedule regular products deliveries Authorize payments for merchandise Explain the nature of purchasing budgets Plan stock Plan reductions Plan purchases Explain the role of fashion designers Follow up on completeness and delivery of orders Obtain competing prices from vendors Establish vendor standards		
			Analyze proposed purchases Prepare/Review purchasing budgets	

MICHIGAN VALIDATION PANEL FOR FASHION MERCHANDISING
PURCHASING

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
			Prepare buying plan Plan buying trip	

MICHIGAN VALIDATION PANEL FOR FASHION MERCHANDISING
RISK MANAGEMENT

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
Explain routine security precautions				
Use fire and safety equipment				
Use safety precautions				
Explain procedures for handling accidents				
	Follow procedures in robbery situations			
	Follow shoplifting policies/procedures			
	Follow procedures for preventing internal theft			
	Identify/use methods for protecting merchandise			
	Correct hazardous working conditions			
	Follow procedures for handling financial resources			
		Explain the types of risk		
		Explain risk management methods		
		Develop emergency measures and plans		
			Explain procedures in robbery situations	
			Explain shoplifting policies/procedures	
			Explain procedures for preventing internal theft	
			Bond employees (jewelry/furs)	
				Obtain service contracts to limit liability
				Obtain insurance coverage
				Settle insurance losses

MICHIGAN VALIDATION PANEL FOR FASHION MERCHANDISING
RISK MANAGEMENT CONTINUED

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
				Establish policies for handling financial resources
				Establish policies/procedures for business security
				Establish fire prevention program
				Establish safety policies and procedures

MICHIGAN VALIDATION PANEL FOR FASHION MERCHANDISING
SELLING

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
Explain the purpose and importance of selling				
Explain company selling policies				
Open the sales presentation				
Question/Probe for information				
Suggest product substitution				
Demonstrate product				
Close the sale				
Use suggestion selling				
Process telephone orders				
Wrap/Pack merchandise				
Sell gift certificates				
	Address needs of individual personalities (client)			
	Use buying motives as basis of sales presentation			
	Facilitate customer buying decisions			
	Explain key factors in building a clientele			
	Explain the selling process			
	Question/Probe for information (advanced)			
	Use feature/benefit selling			
	Handle customer/client objections			
	Explain follow-up techniques			
	Maintain/Use customer/prospect list			
	Obtain product information from sources on/with the item			
	Obtain product information from appropriate individuals/mgt.			
	Use company promotional material for selling information			
	Explain sales quotas			

MICHIGAN VALIDATION PANEL FOR FASHION MERCHANDISING
SELLING CONTINUED

ENTRY-LEVEL	CAREER-SUSTAINING	MARKETING SPECIALIST	MARKETING SUPERVISOR	MANAGER ENTREPRENEUR
Analyze customers (apparel and accessories) Explain use of brand names in selling Explain fashion brand images Arrange alterations Arrange delivery of purchases Process special orders				
	Explain services and terms being advertised by competitors Prepare sales report Explain the nature of telemarketing Conduct seasonal fashion clinics/workshops for sales personnel			
		Organize sales territories Explain the nature of sales training Develop sales-incentive programs Develop sales quotas by merchandise lines Explain the (floor) responsibilities of the sales staff Maintain sales records Analyze selling strategies appropriate to a business/customer Establish sales objectives Set up sales call/reporting system		

Appendix A

Members on DACUM Panel

Andrea Burleigh
Eddie Bauer
Assistant Manager
Casual Sportswear

Michael Cheesebro
Richman Brothers
Assistant Manager
Men's and Women's Career

Carla Noe
C.J. Radrags
Owner
Children's clothing
(Carla also represented jewelry)

Peg Sarantos
Hudson's
Department Manager
Junior's and Lingerie

Debbie Valliere
Thom McAn Shoes
Manager
Footwear

Appendix B

Invitational Letter and Enclosures

Consumer Resources and Technology

Kalamazoo, Michigan 49008-5067
616 387-3704

WESTERN MICHIGAN UNIVERSITY

March 1, 1992

Andrea Burlegh
Assistant Manager
Eddie Bauer
6650 South Westnedge
Kalamazoo, MI 49002

Dear Andrea:

Thank you for agreeing to assist us in our curriculum development efforts for Fashion Merchandising. We are committed to the belief that up to date fashion merchandising programs must meet the needs of students as they graduate and move into the workforce. The success of such programs relies heavily on the strong guidance and support of business leaders such as yourself.

As we discussed, you will be a member of a panel of professionals charged with the responsibility of reviewing and validating key job tasks performed by apparel and accessories industry employees.

To assist you in understanding your role as a panel member, we have enclosed the following handouts:

1. Overview of Fashion Merchandising Validation Panel Process
2. Marketing Education in Michigan
3. Marketing Education Resource Center, Inc.

We look forward to meeting with you on Tuesday, March 10, 1992. Our meeting will be on campus at the Fetzer Center (see enclosed map and parking permit). The meeting will begin at 10:00 a.m. with a continental breakfast at 9:30 a.m. We will conclude no later than 3:30 p.m. It is essential that you plan to participate in the entire session.

We thank you in advance for your support and cooperation and look forward to working with you on the 10th.

Sincerely,

Carl Woloszyk
Associate Professor
Project Mentor

Kelli Guikema
Fashion Merchandising/
Honors College Student
Principal Investigator

Enclosures

Consumer Resources and Technology

Kalamazoo, Michigan 49008-5067
616 387-3704

WESTERN MICHIGAN UNIVERSITY

March 1, 1992

Michael Cheesebro
Assistant Manager
Richman Brothers
6650 South Westnedge
Kalamazoo, MI 49002

Dear Michael:

Thank you for agreeing to assist us in our curriculum development efforts for Fashion Merchandising. We are committed to the belief that up to date fashion merchandising programs must meet the needs of students as they graduate and move into the workforce. The success of such programs relies heavily on the strong guidance and support of business leaders such as yourself.

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Sincerely,

Carl A Woloszyk

Carl Woloszyk
Associate Professor
Project Mentor

Kelli A Guikema

Kelli Guikema
Fashion Merchandising/
Honors College Student
Principal Investigator

Enclosures

Consumer Resources and Technology

Kalamazoo, Michigan 49008-5067
616 387-3704

WESTERN MICHIGAN UNIVERSITY

February 24, 1992

Carla Noe, Owner/manager
C.J. Radrags for Kids
240 South Kalamazoo Mall
Kalamazoo, MI 49007

Dear Mrs. Noe:

Thank you for agreeing to assist us in our curriculum development efforts for Fashion Merchandising. We are committed to the belief that up to date fashion merchandising programs must meet the needs of students as they graduate and move into the workforce. The success of such programs relies heavily on the strong guidance and support of business leaders such as yourself.

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We thank you in advance for your support and cooperation and look forward to working with you on the 10th.

Sincerely,

Carl G. Woloszyk

Carl Woloszyk
Associate Professor
Project Mentor

Kelli Guikema

Kelli Guikema
Fashion Merchandising/
Honors College Student
Principal Investigator

Enclosures

Consumer Resources and Technology

Kalamazoo, Michigan 49008-5067
616 387-3704

WESTERN MICHIGAN UNIVERSITY

February 24, 1992

Peg Sarantos, Junior/Lingerie manager
Hudson's, Crossroads Mall
6666 South Westnedge
Kalamazoo, MI 49002

Dear Peg:

Thank you for agreeing to assist us in our curriculum development efforts for Fashion Merchandising. We are committed to the belief that up to date fashion merchandising programs must meet the needs of students as they graduate and move into the workforce. The success of such programs relies heavily on the strong guidance and support of business leaders such as yourself.

As we discussed, you will be a member of a panel of professionals charged with the responsibility of reviewing and validating key job tasks performed by apparel and accessories industry employees.

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We thank you in advance for your support and cooperation and look forward to working with you on the 10th.

Sincerely,

Carl G. Woloszyk

Carl Woloszyk
Associate Professor
Project Mentor

Kelli Guikema

Kelli Guikema
Fashion Merchandising/
Honors College Student
Principal Investigator

Enclosures

Fashion Merchandising? Tell me exactly what competencies we will be reviewing.

Research has identified fashion merchandising competencies that are needed across all apparel and accessories occupations which require less than a B.A. degree, regardless as to place in distribution channel, and/or type of business.

The fashion merchandising competencies list includes occupational specific and industry unique competencies.

February, 1992

Marketing Education Resource Center, Inc.

The Marketing Education Resource Center, Inc. (or MarkED) is a non-profit (501(c)(3)) research and development agency operated by thirty-three state education departments in a "consortium" arrangements. The agency is affiliated with The Ohio State University through the College of Education. It is primarily self-supporting, with approximately 85 percent of its operating budget derived from the cost-recovery sale of curriculum and instructional materials. The remaining income streams are from consortium membership fees, consulting, and professional development conferences.

Established in the early 1970's, MarkED's mission is to develop and disseminate systematic approaches for planning, organizing, directing, and evaluating curricula for marketing-related occupations. The mission is addressed through four broad goals:

1) to provide professional development for marketing instructors (high school and community/technical colleges)

2) to develop valid curriculum and instructional materials for high school, postsecondary, and adult educators using sound, research-based models.

3) to provide an information-management service supporting instructors' efforts to remain current in marketing and in education for marketing.

4) to maintain an ongoing research program to support valid, quality instruction in marketing.

Over the past several years, MarkED has assumed a leadership role in efforts to effect improved curriculum and instruction in local marketing programs. Representatives of its 33 "member" states and other recognized national leaders meet annually to provide guidance and direction for the MarkED staff. An elected Board establishes policy and monitors operation on behalf of the Consortium. A staff of 16 is responsible for execution of the Board's annual program of work.

MARKETING EDUCATION IN MICHIGAN

Marketing Education is an instructional program offered in a variety of settings, including high schools, area centers, and community colleges. It is known as Distributive Education (DE), Retailing, Co-op, and DECA. The proper label is Marketing Education, but many schools may still refer to the program by the archaic DE or Retailing titles.

DECA is a youth organization that provides leadership, recognition, and competitive activities and opportunities for marketing students. It is generally viewed as an integral part of the total marketing program.

Current high school marketing enrollment is 15,000 students in 240 high schools and area centers. DECA enrollment is 4,050 in 125 high schools and area centers.

The mission of Marketing Education is: 1) to develop competent workers in and for the major occupational areas within marketing; 2) to assist in the improvement of marketing techniques; and 3) to build understandings of the wide range of social and economic responsibilities which accompany the right to engage in marketing businesses in a free enterprise system.

The discipline of marketing provides the content base for instruction. Marketing programs serve a wide range of training needs, from basic entry level competencies (e.g. retail cashiers) to those focusing on operational management and entrepreneurial development.

Frequently marketing education students participate in cooperative education work experiences, working part-time in a marketing business under the joint supervision of the businesses' supervisor and teacher/coordinator. Other programs utilize a school laboratory or store to provide a "simulated" work experience.

Marketing Education programs are taught by certified teachers who are vocationally certified in marketing education (e.g. they have completed at least a minor in marketing courses in college and have been employed for at least two years in a marketing occupation).

FETZER
BUSINESS DEVELOPMENT CENTER

DIRECTIONS TO THE CENTER

From I-94 Detroit (East) and Chicago (West)

At Exit #75, turn north onto Oakland Drive, drive 2.7 miles; turn left onto Howard Street, go 1.1 miles; turn right onto West Michigan Avenue. Turn left at the second street, Rankin Avenue, then turn right onto Business Court. Turn left into the large parking lot, then immediately right into the Fetzer Center parking area, Lot 72F.

From US 131 (North) Grand Rapids, Muskegon

At Exit #36A, turn east onto Stadium Drive, drive 2.2 miles; to Howard Street; turn left and go 0.6 miles; turn right onto West Michigan Avenue. Turn left at the second street, Rankin Avenue, then right onto Business Court. Turn left into the large parking lot, then immediately right into the Fetzer Center parking area, Lot 72F.

From M-43 North of Kalamazoo

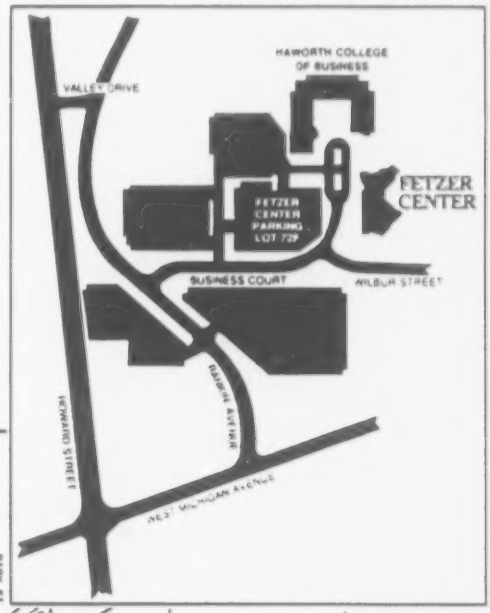
Follow westbound M-43 through downtown Kalamazoo (Gull Road—Riverview Avenue—East Michigan Avenue—Kalamazoo Avenue—West Main Street) until reaching Solon Street (the fourth traffic light after Kalamazoo Avenue merges with West Main Street and becomes two-way traffic, near Kalamazoo College.) Turn left onto Solon and drive south 0.5 miles where Solon turns into Howard Street. At the light turn left onto West Michigan Avenue. Turn left at the second street, Rankin Avenue, then right onto Business Court. Turn left into the large parking lot, then immediately right into the Fetzer Center parking area, Lot 72F.

From Downtown Kalamazoo

Drive westerly on Stadium Drive (Business Route 131). At Howard Street turn right and drive 0.6 miles; at the light turn right onto West Michigan Avenue. Turn left at the second street, Rankin Avenue, then turn right onto Business Court. Turn left into the large parking lot, then immediately right into the Fetzer Center parking area, Lot 72F.

From M-43 West of Kalamazoo

Drive easterly past US 131 and after 1.9 miles, turn right onto Solon Avenue and drive south 0.5 miles where Solon turns into Howard Street. At the light turn left onto West Michigan Avenue. Turn left at the second street, Rankin Avenue, then right onto Business Court. Turn left into the large parking lot, then immediately right into the Fetzer Center parking area, Lot 72F.



WESTERN MICHIGAN UNIVERSITY

Appendix C

Validation Panel Agenda, Handouts and Minutes

FASHION MERCHANDISING VALIDATION PANEL
WESTERN MICHIGAN UNIVERSITY
MICHIGAN DEPARTMENT OF EDUCATION

March 10, 1992
Fetzer Center
Western Michigan University

9:30 - 10:00	Coffee/Welcome	
9:30 - 9:40	Introductions	C. Woloszyk, WMU
9:40 - 10:00	Purpose/Importance of Panel - Marketing Education Framework	T. Benton, CTES
10:00 - 10:15	Procedure - MarkED Research Process - Literature Review	 C. Woloszyk K. Guikema, WMU
10:15 - 10:30	Levels of Employment - Representative Job Titles Identified	Panel Members (large group)
10:30 - 11:00	Start Validation - By units/tasks - Review wording - Identify level	Panel Members
11:00 - 11:10	Break	
11:10 - 12:00	Validation Continues	Panel Members
12:00 - 12:30	Lunch	On Site
12:30 - 1:30	Complete Validation	Panel Members
1:30 - 2:30	Start Frequency/Criticality Survey	Panel Members
2:30 - 2:35	Seventh Inning Stretch Break	
2:35 - 3:30	Complete Survey	Panel Members
3:30	Adjourn	

Marketing Education

Mission Statement

The mission of Marketing Education at prebaccalaureate levels is to develop competent workers in and for the major occupational areas within marketing, assist in the improvement of marketing techniques, and build understandings of the wide range of social and economic responsibilities that accompany the right to engage in marketing in a free enterprise system.

Essential to the implementation of this mission are these six fundamental premises:

1. ***The discipline of marketing and the practices and procedures of the marketing industry are the basis of the curriculum.***

2. ***Instruction will stress application to and involvement with businesses and utilize a variety of methods.***

3. ***Programs will deliver a wide range of instruction including foundational skills required for marketing, marketing functions and applications, career competency development, and management and entrepreneurial development.***

4. ***Professional instructional personnel in Marketing Education will have training in marketing, in marketing education, and will possess business experience in the field of marketing.***

5. ***Marketing Education is an integral part of the school with direction coming largely from a business community advisory group.***

6. ***Instruction is competency-based. Emphasis is upon students developing and demonstrating specified occupational competencies using standards of performance comparable to employer expectations.***

Michigan Marketing Educators...
committed to the improvement of marketing.

LEVELS OF EMPLOYMENT IN MARKETING

Employment in marketing can be conceptualized in levels from simple to complex in terms of assigned responsibilities and extent of skills and knowledge required. The occupational requirements for each level of employment guide the identification of instructional objectives and learning activities. The marketing activities which take place at each level of employment can still be classified in the broad categories of marketing functions, but the activities vary in complexity from level to level. Prebaccalaureate marketing education is directed to instruction at the first five levels of marketing employment.

Entry-level marketing occupations involve standard or routine activities with limited need for decision-making skills. These jobs may be obtained by individuals with no previous marketing education, experience, or commitment to a marketing career. Competencies required to secure and hold such a job address good personal appearance, general business behavior, and basic skills such as math and communications.

Career-sustaining level marketing occupations involve performing more complex duties, using routine decision-making skills, and limited control of one's own working environment. Individuals in a career-sustaining level job should have a basic understanding of the marketing concept and its foundations and have indicated an initial interest in marketing as a potential career.

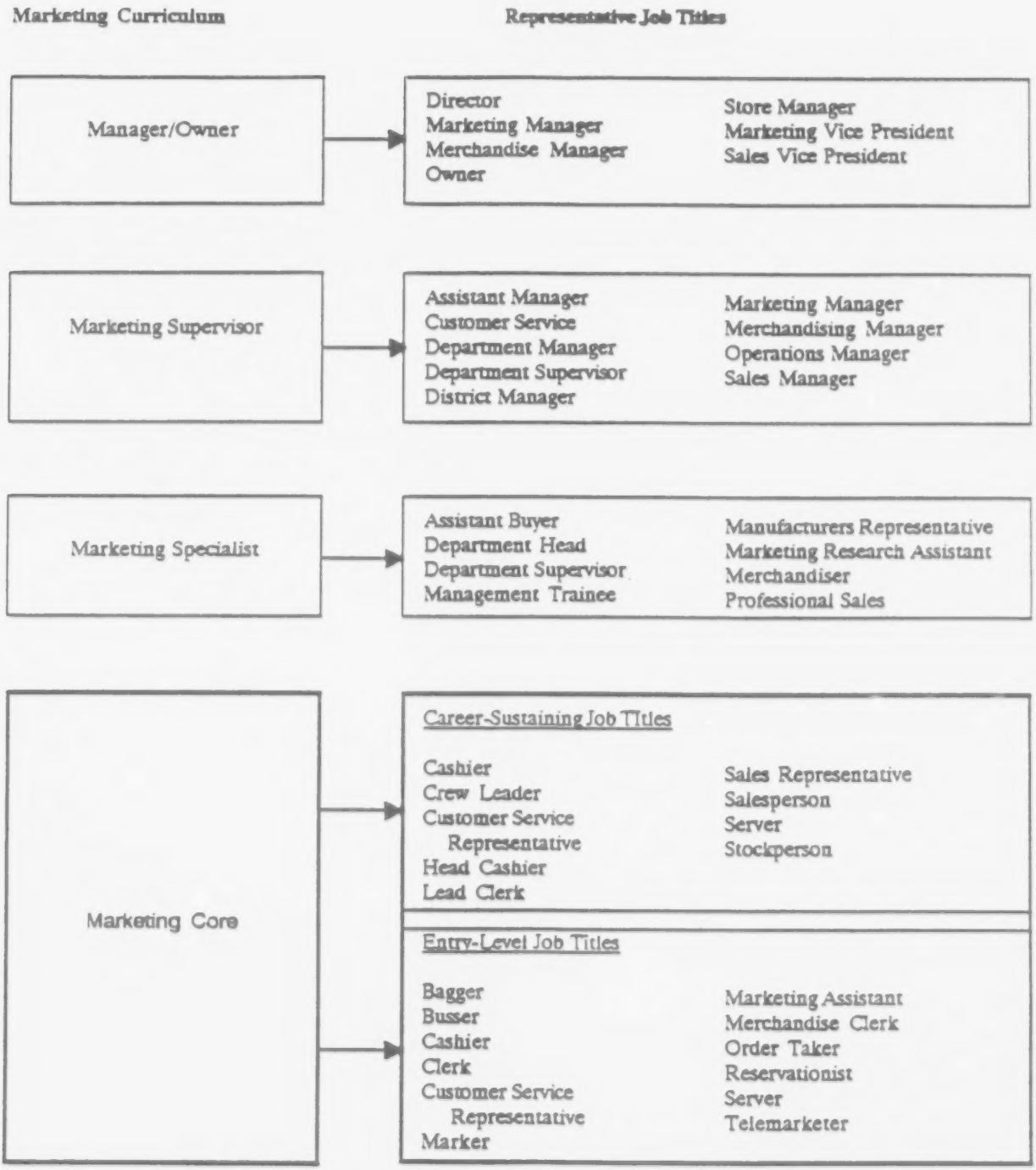
Marketing Specialist occupations involve frequent use of decision-making and leadership skills. Jobs at this level require mastery of marketing skills across functions or extensive technical knowledge/skill in one function. Individuals in a marketing specialist occupation need to have a thorough understanding of the marketing concept and its functions.

Marketing Supervisor involves a high level of competence in decision-making and leadership. Individuals in this role are responsible for planning, coordinating, and supervising people. They may also be involved in the planning, coordinating, and supervising of marketing-related activities.

Manager-Entrepreneur implies competence in a variety of tasks related to owning one's own business or managing a department within an organization. Individuals at this level are fully responsible for the success or failure of a unit within an organization or of a small business enterprise. A comprehensive understanding of marketing and management competencies is required to function in this role.

There are higher levels of employment in marketing which involve the preparation of individuals for top-level positions such as executives of large companies. These positions usually require baccalaureate degrees or extensive experience and thorough comprehension of the theories of marketing and their application to corporate activity.

MARKETING EDUCATION CLUSTER CAREER CHART



Completion of each level prepares students to obtain positions listed as representative job titles in one or more of the following occupational areas: Apparel/Accessories Marketing, Entrepreneurship (Small Business Management), Entrepreneurship (Small Business Ownership), Finance Services Marketing, Food Marketing, General Merchandising/ Retailing, Hospitality and Recreation Marketing, Sales, Transportation and Travel Marketing, and Vehicle/Petroleum Marketing.

Fashion Merchandising Validation Panel

Minutes

The Apparel and Accessories Marketing (Fashion Merchandising) Validation Panel meeting was held on Tuesday, March 10, 1992, at Western Michigan University, Fetzer Center. The meeting began at 10:00 a.m. and ended at 3:30 p.m.

Attendees:

Andrea Burleigh	Eddie Bauer
Michael Cheesebro	Richman Brothers
Carla Noe	C. J. Radrags
Peg Sarantos	Hudson's
Debbie Valliere	Thom McAn

Others:

Kelli Guikema	Western Michigan University
Carl Woloszyk	Western Michigan University
Tom Benton	Michigan Department of Education

Coffee was served at 10:00 a.m.

Panel members introduced themselves at 10:30 a.m.

Mr. Benton talked about the purpose and importance of the panel. A Marketing Education Mission Statement was given to each panel member explaining the importance of prebaccalaureate marketing education, especially marketing tasks. He also talked about MarkED, a 37 state consortium specializing in the research and development of marketing instructional materials.

Dr. Woloszyk talked about the 5 step MarkED research process and focused on step 5:

Step
1. Literature review
2. Management Panel
3. Cluster Panel
4. Analysis and Synthesis
5. Validation Panel
   - -conducted in several geographic locations
   - -validate task lists
   - -sequence task statements
   - -identify level of task
6. Data Base Management

Ms. Guikema talked about her involvement in conducting the literature review, including cross referencing and compiling task lists and prospecting panel members.

Dr. Woloszyk handed out a sheet explaining the 5 levels of employment in marketing, reviewing each one. He then asked them to identify fashion specific representative job titles for each level.

1. Entry Level

routine activities
limited decision-making
no experience necessary
good personal appearance
general business behavior
basic math and communication skills

Job Titles:

Bagger
Cashier
Clerk
Merchandise Clerk
Server
Stock Lead

2. Career-Sustaining

routine decision making
limited control of working environment
interest in marketing as a career
basic understanding of marketing concept

Job Titles:

Cashier
Team Leader
Customer Service Representative
Sales Support
Sales Representative
Salesperson
Stockperson
Sales Consultant/Associate/Assistant

3. Marketing Specialist

frequent use of decision making/leadership skills

Job Titles

Assistant Buyer
Management Trainee
Visual Lead
Visual Merchandiser
Professional Sales Associate
Commission Sales Consultant
Customer Service Lead

4. Marketing Supervisor

high level of competence in decision-making and leadership
planning, coordinating, and supervising people
involved in marketing activities

Job Titles

Assistant Manager
Customer Service Manager
Department Manager
Department Supervisor
Merchandise Manager
Operations Manager
Buyer

5. Manager/Owner

competency in owning own business or managing a department or store
fully responsible for success or failure
comprehensive understanding of marketing/management

Job Titles

Merchandise Manager
Owner
District Manager
Store Manager
Regional Manager

The panel decided to review all task lists as a group. They were instructed to review wording, add tasks, add of delete tasks, review sequence and identify by level.

Discussion:

1. Under Mathematics, page 1:
   -on #4, take out "bank" and change to "Prepare and maintain cash drawers"
   -delete #5
   -delete #14
   -#17 add "(shoes/imported clothing)"
   -add statement "Prepare/Process UPS shipping forms", level 1

2. Under Communications, page 2:
   -add "about product knowledge" to #1
   -add "Deliver fashion show commentary", level 2
   -add "Write fashion show commentary", level 2

3. Under Human Relations, page 3:
   -add "disabled"
   -delete #4
   -#5 delete "describe techniques for"

4. Under Operations, page 6:
   -#2 change to "Explain the use of computers"
   -#6 change "business facility" to "store"

5. Under Product Knowledge, page 7:
   -combine #'s 9,10, and 11 into one statement and add "children's" and "accessories"
   -combine #'s 13, 14 and 15 into one statement
   -#16 add "and features" after "methods"
   -#17 add "and accessories" to end of task statement
   -add "Evaluate style characteristics of children's apparel", level 2
   -add "Evaluate silhouette/model characteristics of children's apparel", level 2

6. Under Distribution, page 8:
   -#2 add "check in" before "processing"
   -#8 delete "Make and"
   -delete #9
   -#11 change "Route" to "Transport"
   -#12 change "stock" to "merchandise"
   -#13 change "stock" to "merchandise"
   -delete #14
   -#17 add "Monitor/"
   -delete #21
   -delete #23
   -add "Inspect and prepare merchandise for floor (unwrap, steam, change hangers)", level 1
   -add "check for shipping/receiving discrepancies", level 2
   -add "prepare merchandise for transfer (to/from) branches", level 2

-add "Organize merchandise storage space", level 2

7. Under Financing, page 9:
-delete #4
-#15 add "credit" before "policies"
-delete #17
-#18 change to "Obtain line of credit"
-delete #19
-add "Comply with bankcard acceptance procedures

8. Under Product/Service Planning, page 12:
-delete #2
-delete #3
-#4 after "factors" add "(natural fibers/ingredients)"
-delete #7
-#10 add "store's/" before "company's"
-move #12 and #14 to Operations, page 6
-#15 change to "Develop product/service plans and schedule"
-move #16 to Marketing Information Management, page 10.

9. Under Promotion, pages 13 and 14:
-#13 delete "and use"
-#37 to "Plan special promotions (credit, employee incentive)"
-add "Use display fixtures", level 2
-add "Plan sales promotions", level 5

10. Under Risk Management, page 16:
-#4 change to "Identify/Use methods for protecting merchandise", level 2
-#5 change "Develop" to "Obtain"
-#8 change "procedures" to "policies"
-#9 add "(jewelry/furs)"
-add "Follow procedures for handling financial resources", level 2
-add "Follow procedures in robbery situations", level 2
-add "Follow shoplifting policies/procedures", level 2
-add "Follow procedures for preventing internal theft", level 2
-add "Follow methods for protecting merchandise", level 2

11. Under Selling, page 17:
-#6 change "products" to "merchandise"
-#10 change "the buyer" to "sales staff"
-#12 add "/workshops" after "clinics"

Mr. Benton, Dr. Woloszyk and Ms. Guikema thanked the panel members for their help, stating the importance of the work that they had accomplished.

The meeting adjourned at 3:30 p.m.

Appendix D

Follow-Up Letter and Participation Records

March 17, 1992

Andrea Burlegh
Assistant Manager
Eddie Bauer
6650 South Westnedge
Kalamazoo, MI 49002

Dear Andrea:

Enclosed please find a listing of the concepts and job tasks for Fashion Merchandising at the various levels of instruction, as determined by our validation panel at the March meeting. Kelli Guikema has edited the original master list, clarified several tasks and included the additional tasks which were suggested by the panel. The specific fashion merchandising tasks are asterisked.

Please review the individual pages for spelling and grammar. We have also tried to sequence the concepts and tasks by order of difficulty (easiest tasks to the more difficult). You should make any suggestions and/or changes on the individual sheets and return the sheets with suggestions in the enclosed envelope no later than Wednesday, March 25, 1992. Be sure to include your participation record, even if you do not have any suggested changes.

It is anticipated that the final research report will be available in late April. When the final report is available, you will receive a copy. Thank you in advance for your help and assistance in providing meaningful input for the improvement of fashion merchandising programs throughout the country.

Sincerely,

Kelli A. Guikema
Fashion Merchandising/
Honors College Student
Principal Investigator

Carl A. Woloszyk
Associate Professor
Project Mentor

March 17, 1992

Michael Cheesebro
Assistant Manager
Richman Brothers
6650 South Westnedge
Kalamazoo, MI 49002

Dear Michael:

Enclosed please find a listing of the concepts and job tasks for Fashion Merchandising at the various levels of instruction, as determined by our validation panel at the March meeting. Kelli Guikema has edited the original master list, clarified several tasks and included the additional tasks which were suggested by the panel. The specific fashion merchandising tasks are asterisked.

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Sincerely,

Kelli A. Guikema
Fashion Merchandising/
Honors College Student
Principal Investigator

Carl A. Woloszyk
Associate Professor
Project Mentor

Kelli -
It was a
pleasure working
with you.

March 17, 1992

Carla Noe
Owner/Manager
C.J. Radrags
240 South Kalamazoo Mall
Kalamazoo, MI 49007

Dear Carla:

Enclosed please find a listing of the concepts and job tasks for Fashion Merchandising at the various levels of instruction, as determined by our validation panel at the March meeting. Kelli Guikema has edited the original master list, clarified several tasks and included the additional tasks which were suggested by the panel. The specific fashion merchandising tasks are asterisked.

Please review the individual pages for spelling and grammar. We have also tried to sequence the concepts and tasks by order of difficulty (easiest tasks to the more difficult). You should make any suggestions and/or changes on the individual sheets and return the sheets with suggestions in the enclosed envelope no later than Wednesday, March 25, 1992. Be sure to include your participation record, even if you do not have any suggested changes.

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Sincerely,

Kelli Guikema

Kelli A. Guikema
Fashion Merchandising/
Honors College Student
Principal Investigator

Carl Woloszyk

Carl A. Woloszyk
Associate Professor
Project Mentor

cc-

2

everything matched
my notes!

March 17, 1992

Peg Sarantos
Junior/Lingerie Manager
6666 South Westnedge
Hudson's, Crossroads Mall
Kalamazoo, MI 49002

Dear Peg:

Enclosed please find a listing of the concepts and job tasks for Fashion Merchandising at the various levels of instruction, as determined by our validation panel at the March meeting. Kelli Guikema has edited the original master list, clarified several tasks and included the additional tasks which were suggested by the panel. The specific fashion merchandising tasks are asterisked.

Please review the individual pages for spelling and grammar. We have also tried to sequence the concepts and tasks by order of difficulty (easiest tasks to the more difficult). You should make any suggestions and/or changes on the individual sheets and return the sheets with suggestions in the enclosed envelope no later than Wednesday, March 25, 1992. Be sure to include your participation record, even if you do not have any suggested changes.

It is anticipated that the final research report will be available in late April. When the final report is available, you will receive a copy. Thank you in advance for your help and assistance in providing meaningful input for the improvement of fashion merchandising programs throughout the country.

Sincerely,

Kelli A. Guikema
Fashion Merchandising/
Honors College Student
Principal Investigator

Carl A. Woloszyk
Associate Professor
Project Mentor

Participation Record

This form will indicate that I participated voluntarily in a DACUM validation panel meeting on March 10, 1992, in Kalamazoo, Michigan for fashion merchandising occupations.

I have reviewed the concepts, job tasks, and the career hierarchy which resulted from the meeting and believe that they accurately reflect the consensus of the panel members.

It is also my understanding that my input and individual responses will remain anonymous. I also understand, however, that my name will be recognized in the final report as a participant

Cindrea Burleigh
Name of Panel Member

Eddie Bauer
Name of Business

1st Assistant Manager
Job Title/Position

Please return to:

Kelli Guikema
Fashion Merchandising/
Honors College Student
Principal Investigator

Participation Record

This form will indicate that I participated voluntarily in a DACUM validation panel meeting on March 10, 1992, in Kalamazoo, Michigan for fashion merchandising occupations.

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_____

Name of Panel Member

_____

Name of Business

_____

Job Title/Position

Please return to:

Kelli Guikema
Fashion Merchandising/
Honors College Student
Principal Investigator

Participation Record

This form will indicate that I participated voluntarily in a DACUM validation panel meeting on March 10, 1992, in Kalamazoo, Michigan for fashion merchandising occupations.

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Carla J. Roe
Name of Panel Member

C. J. Radrags
Name of Business

owner/manager
Job Title/Position

Please return to:

Kelli Guikema
Fashion Merchandising/
Honors College Student
Principal Investigator

Participation Record

This form will indicate that I participated voluntarily in a DACUM validation panel meeting on March 10, 1992, in Kalamazoo, Michigan for fashion merchandising occupations.

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Greg Saranto
Name of Panel Member

Hudson's
Name of Business

area manager juniors / lingerie
Job Title/Position

Please return to:

Kelli Guikema
Fashion Merchandising/
Honors College Student
Principal Investigator

Thanks Kelli - it was a great experience.

Participation Record

This form will indicate that I participated voluntarily in a DACUM validation panel meeting on March 10, 1992, in Kalamazoo, Michigan for fashion merchandising occupations.

I have reviewed the concepts, job tasks, and the career hierarchy which resulted from the meeting and believe that they accurately reflect the consensus of the panel members.

It is also my understanding that my input and individual responses will remain anonymous. I also understand, however, that my name will be recognized in the final report as a participant

Debbie Valliere
Name of Panel Member

Thom McAn
Name of Business

Manager
Job Title/Position

Please return to:

Kelli Guikema
Fashion Merchandising/
Honors College Student
Principal Investigator

Appendix E
Letters of Support

MarkED

Marketing Education
Resource Center, Inc.

MarkED
1375 King Avenue
P.O. Box 12226
Columbus, OH 43212-0226
Phone 614-486-6708

October 18, 1991

Ms. Kelli Guikema
1942 South 11th St. 2-D
Kalamazoo, MI 49009

Dear Kelli:

MarkED, a nonprofit organization specializing in instructional design for marketing education, is interested in working with you on the WMU Undergraduate Research and Creative Award Program. As discussed with Dr. Woloszyk, you would conduct library research to enlarge an initial listing of fashion marketing tasks and concepts. You would also arrange the logistics for a DACUM session with business representatives from the fashion marketing industry who would validate the competencies.

The results of your study would form the basis for additional validation panels that would be conducted in five states. The validated competencies would be included in MarkED's competency data base that is accessed by 7,000 high school marketing instructors for the development of individualized curriculum for their students. Ultimately, the validated competencies would form the framework for the development of competency-based instructional modules that are used by approximately 750,000 high school marketing students throughout the United States each year.

My staff feels that your background in fashion merchandising should enhance the outcomes of the project through the development of a comprehensive competency listing and the identification of qualified industry representatives. These outcomes will affect the quality, validity, and credibility of the education of many marketing students in Michigan and throughout our country.

Sincerely,

Beth M. Osteen
Vice President
Research and Development

cc Dr. Carl Woloszyk

STATE OF MICHIGAN
DEPARTMENT OF EDUCATION

GARY D. HAWKS
Interim Superintendent
of Public Instruction

VOCATIONAL-TECHNICAL EDUCATION SERVICE
Box 30009, Lansing, Michigan 48909
(517) 373-3373

October 17, 1991

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ANNETTA MILLER

GOV. JOHN M. ENGLER
Ex Officio

Ms. Kelli Guikema
1942 South 11th, Apt. 2-D
Kalamazoo, MI 49009

Dear Ms. Guikema:

The letter is in support of your application for the Western Michigan University Undergraduate Research and Creative Activity Award Program for 1991-92. The research proposal which you plan to submit--"Study to Determine the Job Tasks and Levels of Employment for Fashion Marketing Occupations Using DACUM Occupational Analysis"--will be of great benefit to us.

We also believe that the process of conducting the DACUM will be an outstanding learning experience for you, especially because of your current major and future career plans in Fashion Marketing. You will be required to conduct a literature review of current industry-specific publications to identify job tasks and levels, organize a panel of 8 to 12 representative employer and managers from the occupational area, conduct a formal review of identified jobs with the selected panel members, and to compile results and conclusions from the research and panel review.

I am willing to assist you in cooperation with your faculty mentor Dr. Carl Woloszyk in advising on the processes and organization of the project.

The final results and report will be used to update the Michigan Marketing Education Curriculum Guide. This guide is used by over 200 high school Marketing Educators and over 30 community college Marketing Educators in planning their course content and outlines. We will also submit your report to the Marketing Education Resource Center, a 37-state curriculum consortium, to be included in the national data base. Because of the potential impact of this report on the state and national level, it is vital that the DACUM process be followed carefully and precisely.

I would also note the lack of validated occupational research that has been conducted by the fashion marketing industry itself. Not only will you be making an impact on marketing curriculum, but also on the fashion marketing industry. The insights that you will gain from your research into the job tasks and hierarchy of job titles are sought by managers in the fashion industry every day.

Your willingness to work with the Michigan Department of Education in making application to the Award Program is greatly appreciated. We look forward to working with you on this learning and research project.

Sincerely,

Thomas L. Benton

Thomas L. Benton, Consultant
Marketing Education

Consumer Resources and Technology

Kalamazoo, Michigan 49008-5067
616 387-3704

WESTERN MICHIGAN UNIVERSITY

October 29, 1991

Dear Undergraduate Research Award Committee Members:

This letter of support will indicate my willingness to serve as a faculty mentor for Ms. Kelli Guikema. Kelli's research proposal will determine the job tasks and levels of employment for the apparel and accessories industry. The results will have an impact beyond the campus of Western Michigan University and assist in statewide and national curriculum development efforts. (see other support letters)

Since Kelli's major is fashion merchandising, she will be able to gain valuable information about an industry, which is directly related to her field of study. This experience will allow her to professionally contribute to the field and to personally benefit by meeting and working with industry leaders.

I will assist her with all aspects of her study and will guide her in the written preparation of the final report. She will also gain an opportunity to present the results of her study at a mini-research convocation held in conjunction with an upcoming national marketing education conference.

Ms. Guikema has the personal and organizational skills necessary to successfully complete the project. I wholeheartedly support her application for the undergraduate research award and look forward to a favorable response to the proposal.

If you need any additional information, please contact me at (616) 387-3721.

Sincerely,

Carl A. Woloszyk

Carl A. Woloszyk, Ph.D.
Associate Professor/Faculty Mentor

Appendix F

Time Chart and Activity Summary

	hours
January 31, 1992	
-Meet with Dr. Woloszyk at 10:00 a.m.	1
February 2, 1992	
-Begin reviewing task lists	2
February 5, 1992	
-Work on compiling task lists	2
February 7, 1992	
-Meet with Dr. Woloszyk at 10:00 a.m.	1
February 12, 1992	
-Continue compiliation of lists	2
-Meet with Colleen Molenaar for referrals of panel prospects	.5
-Meet with Melissa Bullock for referrals of panel prospects	.5
February 14, 1992	
-Meet with Dr. Woloszyk 9:00 a.m.	1
February 16, 1992	
-Work on task lists	2
-Meet with panel prospect	.25
February 18, 1992	
-Meet with panel prospect	.25
February 20, 1992	
-Finalize task lists and pick out fashion specific tasks	1
February 21, 1992	
-Meet with Dr. Woloszyk 10:00 a.m.	1.5
February 23, 1992	
-Type handouts and laser print	2
-Type panel follow-up letters	1.5
February 24, 1992	
-Meet with Dr. Woloszyk 11:00 a.m.	1

February 27, 1992	
-prospect panel members at Maple Hill Mall	2
-prospect panel members at Crossroads Mall	2
February 28, 1992	
-make follow-up calls to prospects	1.5
-prospect panel members	2
February 29, 1992	
-print and send follow-up letters (3) to panel members	1
March 2, 1992	
-turn in prospects, follow-up letters etc., to Dr. Woloszyk	.25
March 5, 1992	
-make follow-up calls and prospect calls	1
March 6, 1992	
-Meet with Dr. Woloszyk at 12:30 p.m.	1
March 7, 1992	
-type competency lists and laser print	3
March 9, 1992	
-meet with Dr. Woloszyk 11:00 a.m.	1
-meet with Tom Benton and Dr. Woloszyk at 8:00 p.m.	1
March 10, 1992	
-Conduct validation panel meeting	6
March 14, 1992	
-compile results, type and print	4
March 15, 1992	
-type and print participation record, cover letters and career chart	2
March 17, 1992	
-meet with Dr. Woloszyk 2:30 p.m.	.5
March 18, 1992	
-deliver results and sign off sheet to participants for review	2
March 25 and 26, 1992	
-pick up results and sign off sheet from participants	2

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